



Euromonitor
International

Tissue and Hygiene in Lebanon

March 2025

Table of Contents

EXECUTIVE SUMMARY

Tissue and hygiene in 2024: The big picture

2024 key trends

Competitive landscape

Retail developments

What next for tissue and hygiene?

MARKET DATA

Table 1 - Retail Sales of Tissue and Hygiene by Category: Value 2019-2024

Table 2 - Retail Sales of Tissue and Hygiene by Category: % Value Growth 2019-2024

Table 3 - NBO Company Shares of Retail Tissue and Hygiene: % Value 2020-2024

Table 4 - LBN Brand Shares of Retail Tissue and Hygiene: % Value 2021-2024

Table 5 - Penetration of Private Label in Retail Tissue and Hygiene by Category: % Value 2019-2024

Table 6 - Distribution of Retail Tissue and Hygiene by Format: % Value 2019-2024

Table 7 - Distribution of Retail Tissue and Hygiene by Format and Category: % Value 2024

Table 8 - Forecast Retail Sales of Tissue and Hygiene by Category: Value 2024-2029

Table 9 - Forecast Retail Sales of Tissue and Hygiene by Category: % Value Growth 2024-2029

DISCLAIMER

MENSTRUAL CARE

Key Data Findings

2024 Developments

Demand remains stable with towels deemed to be an essential product

Essity leads menstrual care with the focus being on securing the best value

Supermarkets remain key to sales of menstrual care

Prospects and Opportunities

Menstrual care set to grow but challenges remain

E-commerce expected to play a more prominent role in the future

Players will need to keep cost in mind when innovating

Category Data

Table 10 - Retail Sales of Menstrual Care by Category: Value 2019-2024

Table 11 - Retail Sales of Menstrual Care by Category: % Value Growth 2019-2024

Table 12 - NBO Company Shares of Retail Menstrual Care: % Value 2020-2024

Table 13 - LBN Brand Shares of Retail Menstrual Care: % Value 2021-2024

Table 14 - Forecast Retail Sales of Menstrual Care by Category: Value 2024-2029

Table 15 - Forecast Retail Sales of Menstrual Care by Category: % Value Growth 2024-2029

NAPPIES/DIAPERS/PANTS

Key Data Findings

2024 Developments

Economic pressures and the declining birth rate continue to dampen sales

Procter & Gamble loses ground to more affordable local players

Supermarkets continue to dominate sales

Prospects and Opportunities

Sales of nappies/diapers/pants projected to continue declining

E-commerce showing potential

Product innovation expected to focus on offering more affordable prices

Category Data

Table 16 - Retail Sales of Nappies/Diapers/Pants by Category: Value 2019-2024

Table 17 - Retail Sales of Nappies/Diapers/Pants by Category: % Value Growth 2019-2024

Table 18 - NBO Company Shares of Retail Nappies/Diapers/Pants: % Value 2020-2024

Table 19 - LBN Brand Shares of Retail Nappies/Diapers/Pants: % Value 2021-2024

Table 20 - Forecast Retail Sales of Nappies/Diapers/Pants by Category: Value 2024-2029

Table 21 - Forecast Retail Sales of Nappies/Diapers/Pants by Category: % Value Growth 2024-2029

RETAIL ADULT INCONTINENCE

Key Data Findings

2024 Developments

Sales of retail adult incontinence benefit from Lebanon's ageing population

Sanita leads but faces mounting competition from Mediane

Supermarkets benefit from their convenience

Prospects and Opportunities

Ageing population expected to fuel sales growth

E-commerce seen to have strong potential

Innovations likely to focus on affordability and efficacy

Category Data

Table 22 - Sales of Retail Adult Incontinence by Category: Value 2019-2024

Table 23 - Sales of Retail Adult Incontinence by Category: % Value Growth 2019-2024

Table 24 - NBO Company Shares of Retail Adult Incontinence: % Value 2020-2024

Table 25 - LBN Brand Shares of Retail Adult Incontinence: % Value 2021-2024

Table 26 - Forecast Sales of Retail Adult Incontinence by Category: Value 2024-2029

Table 27 - Forecast Sales of Retail Adult Incontinence by Category: % Value Growth 2024-2029

WIPES

Key Data Findings

2024 Developments

Sales of personal wipes under pressure as consumers look to make savings

Johnson & Johnson remains the leading company in personal wipes thanks to trusted image

Supermarkets benefiting from their convenience while e-commerce struggles to take off

Prospects and Opportunities

Personal wipes still full of potential

E-commerce expected to play a bigger role in personal wipes

Innovations likely to focus on baby wipes

Category Data

Table 28 - Retail Sales of Wipes by Category: Value 2019-2024

Table 29 - Retail Sales of Wipes by Category: % Value Growth 2019-2024

Table 30 - NBO Company Shares of Retail Wipes: % Value 2020-2024

Table 31 - LBN Brand Shares of Retail Wipes: % Value 2021-2024

Table 32 - Forecast Retail Sales of Wipes by Category: Value 2024-2029

Table 33 - Forecast Retail Sales of Wipes by Category: % Value Growth 2024-2029

RETAIL TISSUE

Key Data Findings

2024 Developments

Economic pressures continue to weigh on sales of retail tissue

Sanita leads thanks to strong portfolio of brands

Supermarkets lead the distribution of retail tissue

Prospects and Opportunities

Retail tissue sales set to bounce back once economy stabilises

E-commerce expected to make a bigger contribution to sales of retail tissue but challenges remain

Innovations likely to focus on greener and more affordable products

Category Data

Table 34 - Retail Sales of Tissue by Category: Value 2019-2024

Table 35 - Retail Sales of Tissue by Category: % Value Growth 2019-2024

Table 36 - NBO Company Shares of Retail Tissue: % Value 2020-2024

Table 37 - LBN Brand Shares of Retail Tissue: % Value 2021-2024

Table 38 - Forecast Retail Sales of Tissue by Category: Value 2024-2029

Table 39 - Forecast Retail Sales of Tissue by Category: % Value Growth 2024-2029

AWAY-FROM-HOME TISSUE AND HYGIENE

Key Data Findings

2024 Developments

Drop in tourism activities and rising unemployment hits sales

AFH adult incontinence sees steady growth due to ageing population

Local and regional players lead the sale of AFH products

Prospects and Opportunities

AFH tissue and hygiene expected to see steady growth

Digitalisation still some distance away due to a lack of investment

Customisation will be the key to innovation in AFH tissue

Category Data

Table 40 - Sales of Away-From-Home Tissue and Hygiene by Category: Value 2019-2024

Table 41 - Sales of Away-From-Home Tissue and Hygiene by Category: % Value Growth 2019-2024

Table 42 - Distribution of Away-From-Home Tissue and Hygiene by Format: % Value 2019-2024

Table 43 - Distribution of Away-From-Home Tissue and Hygiene by Format and Category: % Value 2024

Table 44 - Forecast Sales of Away-From-Home Tissue and Hygiene by Category: Value 2024-2029

Table 45 - Forecast Sales of Away-From-Home Tissue and Hygiene by Category: % Value Growth 2024-2029

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/tissue-and-hygiene-in-lebanon/report.